

LOCAL SERVICE ASSESSMENT CHECKLIST

Customer Service Skills Assessment

Clinic Name _____ Date _____

INSTRUCTIONS

Evaluate each feature of customer service skills. Note areas of excellence and opportunities for improvement.

Features	Circle One	Notes
1. Are all participants treated with courtesy and respect?	YES NO	
2. Are staff members consistently friendly and welcoming?	YES NO	
3. Do staff members consistently introduce themselves to participants including their name and job role?	YES NO	
4. Do staff members use body language that is warm, open, and engaging?	YES NO	
5. Do staff members avoid WIC jargon or complicated language?	YES NO	
6. Are the processes, expectations and steps of the appointment explained to participants?	YES NO	
7. Do staff members limit phone interruptions and side conversations with coworkers when serving participants?	YES NO	
8. Do staff members use appropriate phone etiquette?	YES NO	
9. Are staff members able to communicate with difficult or angry participants appropriately?	YES NO	
10. Do staff members manage peak times without appearing overwhelmed?	YES NO	
11. Are staff members able to explain the process for handling a participant complaint?	YES NO	
12. Are bilingual staff or interpreter services available?	YES NO	
13. Do staff members focus on the participant rather than the computer or chart?	YES NO	
14. Is talk-time balanced between participant and staff?	YES NO	
15. Are appropriate referrals offered for other programs and organizations?	YES NO	
16. Do staff members adequately explain the purpose of the WIC program to every new participant?	YES NO	
17. Are participants asked if they have any questions or concerns about their food package, use of WIC foods, and shopping experience?	YES NO	